

Message Text

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ACTION AGR-20

INFO OCT-01 EA-11 ISO-00 EUR-25 NEA-11 CIAE-00 INR-10

NSAE-00 RSC-01 EB-11 COME-00 OMB-01 TAR-02 TRSE-00

DRC-01 STR-08 /102 W

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R 140100Z FEB 74

FM AMEOWASSY CANBERRA

TO SECSTATE WASHDC 2543

LIMITED OFFICIAL USE SECTION 1 OF 2 CANBERRA 0876

PASS: AGRICULTURE FOR REPORTS OFFICER, FAS/W

E#O. 11652: N/A

TAGS: EAGR, EGEN, ASOV

SUBJ: SPECIAL QUARTERLY REPORT LIVESTOCK AND MEAT

REF: CODE: 13C

1. SUMMARY: BEEF AND VEAL PRODUCTION CALENDAR YEAR 1973 AND PRELIMINARY ESTIMATES FOR 1974. 1973 PRODUCTION WAS 1.49 MILLION METRIC TONS CARCASS WEIGHT OR ABOUT 12 PERCENT ABOVE THE PREVIOUS YEAR. EXCELLENT PASTURE CONDITIONS ARE BEING EXPERIENCED THROUGHOUT THE COUNTRY WITH MUCH PUBLICIZED FLOODING HAVING LITTLE OR NO OVERALL EFFECT ON MEAT PRODUCTION FOR 1974. HERD EXPANSION IN CATTLE CONTINUES DUE TO ATTRACTIVE PRICES AND AMPLE PASTURE AND FEED SUPPLY. SHEEP NUMBERS ARE EXPECTED TO INCREASE DURING 1974.

BEEF AND VEAL EXPORTS DURING 1973 WERE 600,000 METRIC TONS PRODUCT WEIGHT, OF WHICH 325,600 METRIC TONS ACTUALLY WENT TO U.S. THIS MEANS INCREASE IN U.S. SHIPMENTS OF 6 PERCENT OVERALL EXPORTS 19 PERCENT. THE REINTRODUCTION OF EC LEVIES AND THE IMPOSITION OF DUTIES IN THE UK (4 PERCENT NOW, 8 PERCENT IN APRIL 1974) HAS LET TO A DRIP IN DEMAND AS WELL AS THE WEAKENING IN THE
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JAPANESE MARKET.

MUTTON PRODUCTION DURING 1973 WAS 314,000 METRIC TONS, A SHARP DROP FOLLOWING THE STEEP FALL IN SHEEP NUMBERS AND HIGH WOOL PRICES. EXCELLENT SEASONAL CONDITIONS CONTINUE TO AGGRAVATE SHORTAGE OF SHEEP FOR SLAUGHTER WITH EWES VIRTUALLY UNPROCURABLE. SHEEP SHORTAGE IS FORCING MANY GRAZIERS INTO CATTLE TO UTILIZE FEED DESPITE HIGH COST OF STOCKERS. IT IS CLEAR THAT SLAUGHTER RATE FOR SHEEP AND LAMB WILL BE DOWN FOR A FEW YEARS TO COME IF HIGH LEVEL WOOL PRICES HOLD. SHARP REDUCTION IN SUPPLY MEANS VOLUME AVAILABLE FOR EXPORT GAVE ACTUAL EXPORTS 109,000 METRIC TONS PRODUCT WEIGHT. ONLY 5,000 METRIC TONS SENT TO U.S. AND OTHER MARKETS NOT PREPARED TO PAY CURRENT HIGH PRICES. JAPAN, CANADA AND MIDDLE EAST WERE MAJOR BUYERS DURING 1973. LESS LAMB WAS AVAILABLE FOR EXPORT FROM AUSTRALIA IN 1973 AS DOMESTIC MARKET STRONG AND PRODUCTION WAS DOWN 24 PERCENT FROM 1972. IT APPEARS THAT SHEEP FARMERS HAVE TAKEN THE LONGER VIEW AND OPTED FOR WOOL RATHER THAN FAT LAMB. END SUMMARY.

PART A - BEEF AND VEAL

	1972	1973	1974 EST.
I. NUMBERS ON FARMS '000 HEAD	27,373	29,199	30-31,000
B) CATTLE SLAUGHTERED '000	6,109	7,007	7,400
C) CALVES SLAUGHTERED '000	1,281	1,255(A)	1,200

NOTE: (A) DRASTIC DROP IN SLAUGHTER SINCE NOVEMBER DUE TO HIGHER CALF DROP AND LOWER SLAUGHTER MAY MEAN LARGER NUMBER TO FURTHER BUILD HERDS.

II. 1973 MEAT PRODUCTION. EXCELLENT SEASONAL CONDITIONS WERE EXPERIENCED OVER VIRTUALLY THE ENTIRE CONTINENT FOR THE ENTIRE YEAR. MILD WEATHER ENCOURAGED PASTURE GROWTH AND IN MOST DISTRICTS GRAZING CONDITIONS WERE THE BEST FOR A NUMBER OF YEARS.

A) PRODUCTION (METRIC TONS CARCASS WEIGHT)

	1972	1973	1974 EST
BEEF	1,274,000	1,443,000	1,532,000
VEAL	47,000	48,500	48,000
TOTAL	1,321,000	1,491,500	1,580,000

B) S&D BEEF AND VEAL CARCASS WEIGHT EQUIVALENT IN LONG TONS

SUPPLY:

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1. STOCKS JAN 1	44,683	46,447	53,240
2. PRODUCTION	1,321,000	1,492,000	1,580,000
3. IMPORTS	41	50	50
4. TOTAL SUPPLY	1,365,724	1,538,497	1,633,290

DISTRIBUTION:

1. DOMESTIC CONS.

EXCL. CANNED. 518,261 506,257 523,050
 2. CANNING 55,000 55,000 55,000
 3. EXPORTS:
 BONE-IN BEEF 10,350 14,000 14,000
 BONELESS BEEF 717,100 874,000 952,000
 VEAL 18,566 36,000 36,000
 4. END STOCKS 46,447 53,240 53,240
 5. TOTAL DISTRIBUTION 1,365,724 1,538,497 1,633,290
 NOTE: PRODUCT WEIGHT TIMES 1.54 EQUALS CWE

A) BONE-IN BEEF EXPORTS ESTIMATED ON ASSUMPTION NO SALES
 TO USSR THIS YEAR

III. 1. AUSTRALIAN MEAT BOARD SUSPENDED ALL DIVERSIFICATION
 REQUIREMENTS FOR EXPORTS DURING 1973 AND SCHEME REMAINS
 SUSPENDED. FORECAST BEEF AND VEAL EXPORTS TO U.S. BY QUARTERS
 DURING CALENDAR 1973, IN METRIC TONS PRODUCT WEIGHT, AS FOLLOWS:

	1973	1974EST METRIC
1ST QUARTER	62,175	84,000
2ND QUARTER	68,646	90,000
3RD QUARTER	105,542	94,000
4TH QUARTER	89,237	85,000
TOTAL CALENDAR YEAR	325,600	353,000

NOTE: INCLUDES ALLOWANCE FOR REJECTIONS OF ABOUT 6,000 TONS.

2. BEEF AND VEAL EXPORTS BY DESTINATION:

	1973 ACTUAL METRIC TONS	1974EST METRIC TONS
U.S.	325,600	353,000
CANADA	33,000	35,000
UK	79,500	56,000
EEC 6	6,445	5,000
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JAPAN	115,400	160,000
MALAYSIA	3,356	3,000
USSR	NIL	NIL
OTHERS	36,799	38,000
	600,100	650,000

NOTE: JAPANESE MOD
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 ACTION AGR-20

INFO OCT-01 EA-11 ISO-00 EUR-25 NEA-11 CIAE-00 INR-10

NSAE-00 RSC-01 EB-11 COME-00 OMB-01 TAR-02 TRSE-00

STR-08 DRC-01 /102 W

----- 025697

R 140100Z FEB 74

FM AMEMBASSY CANBERRA

TO SECSTATE WASHDC 2544

LIMITED OFFICIAL USE SECTION 2 OF 2 CANBERRA 0876

PASS: AGRICULTURE FOR REPORTS OFFICER, FAS/W

PART B - SHEEP AND MUTTON

1973 1974EST

1. NUMBERS ON FARMS

'000 HEAD	1973	1974EST
	140,109	148,000

A) SHEEP

SLAUGHTERED '000	16,398	15,100
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B) LAMBS

SLAUGHTERED '000	15,645	16,000
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NOTE: SHEEP AND LAMB SLAUGHTER REVISED DOWNWARD DUE HIGH WOOL PRICE AND CONSEQUENT ENCOURAGEMENT TO BUILD UP FLOCKS. GOOD SEASONAL AND PASTURE CONDITIONS IN SHEEP/WHEAT BELT ADDITIONAL FACTOR, WHILE TOTAL SHEEP NUMBERS MUCH LOWER THAN EARLIER ANTICIPATED.

II. S&D MUTTON CARCASS WEIGHT EQUIVALENT IN METRIC TONS.

1972 1973EST 1974EST

A) SUPPLY:

1. STOCKS JAN. 1	20,000	15,000	15,000
2. PRODUCTION	532,000	314,000	290,000
3. IMPORTS	NIL	NIL	NIL
4. TOTAL SUPPLY	552,000	329,000	305,000

B) DISTRIBUTION:

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1. DOMESTIC CONSUM-

PTION EXCL. CANNING 251,335 108,000 117,000

2. CANNING	14,000EST	14,000	14,000
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3. EXPORTS	271,665	192,000	159,000
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4. CLOSING STOCKS	15,000	15,000	15,000
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5. TOTAL DISTRIBUTION	552,000	329,000	305,000
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NOTE: PRODUCT WEIGHT BONED MUTTON TIMES 2 EQUALS CWE.

III. EXPORTS OF MUTTON, PRODUCT WEIGHT IN METRIC TONS, BY DESTINATION

	1973 METRIC ACTUAL	1974 EST. METRIC
U.S.	5,000	4,000
CANADA	12,000	12,000
UK	8,000	7,000
EEC	1,400	1,000
JAPAN	52,000	43,000
USSR	NIL	NIL
MALAYSIA	2,500	2,000
MIDDLE EAST	13,000	11,000
OTHERS	14,100	10,000
	109,000	90,000

NOTE: GREECE PURCHASED 7,200 TONS IN 1973. EXPORTS TO U.S.

BY QUARTERS FOR 1973 AS FOLLOWS:

	1972	1973ACT. METRIC	1974EST. METRIC
1ST QUARTER	8,644	1,860	1,000
2ND QUARTER	9,933	1,770	1,000
3RD QUARTER	3,171	785	1,000
4TH QUARTER	4,081	585	1,000
TOTAL CALENDAR YEAR	25,829	5,000	4,000

SUPPLIES 1974 LAMBS ARE EXTREMELY SHORT, AND SLAUGHTER IS EXPECTED TO SHOW LITTLE CHANGE FROM LOW LEVEL 1973. ACCORDINGLY, ONLY NEGLIGIBLE AMOUNTS OF LAMB WILL BE AVAILABLE FOR EXPORT THIS SEASON.
HARROP

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Message Attributes

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